

RFP No.: 65/12/2023/PPIC/2023-ISA

Country: India
Issued on: 01/12/2023

Request For Proposal

**Development of the Programme Initiation Framework for Programme 7:
Solarising Heating and Cooling Systems, ISA**



International Solar Alliance (ISA)
Secretariat, Surya Bhawan, NISE Campus,
Gwal Pahari, Gurugram, Haryana – 122003, India
Website: www.isolaralliance.org

Contents

Section 1. Letter of Invitation	4
Section 2. Instruction to Bidders.....	5
GENERAL PROVISIONS	5
1. Introduction	5
2. Fraud & Corruption, Gifts and Hospitality.....	5
3. Eligibility	5
4. Conflict of Interests.....	5
PREPARATION OF PROPOSALS	6
5. General Considerations.....	6
6. Cost of Preparation of Proposal.....	7
7. Language	7
8. Documents Comprising the Proposal.....	7
9. Documents Establishing the Eligibility and Qualifications of the Bidder	7
10. Technical Proposal Format and Content.....	7
11. Financial Proposals.....	7
12. Proposal Security	8
13. Currencies	8
14. Joint Venture, Consortium or Association	8
15. Only One Proposal	9
16. Proposal Validity Period	10
17. Extension of Proposal Validity Period	10
18. Clarification of Proposal.....	10
19. Amendment of Proposals	10
20. Alternative Proposals.....	11
21. Pre-Bid Conference	11
SUBMISSION AND OPENING OF PROPOSALS	11
22. Submission	11
Email Submission.....	11
23. Deadline for Submission of Proposals and Late Proposals	12
24. Withdrawal, Substitution, and Modification of Proposals.....	12
25. Proposal Opening.....	12
EVALUATION OF PROPOSALS	12

26.	Confidentiality.....	12
27.	Evaluation of Proposals.....	12
28.	Preliminary Examination	13
29.	Evaluation of Eligibility and Qualification	13
30.	Evaluation of Technical and Financial Proposals	13
31.	Due Diligence	14
32.	Clarification of Proposals	15
33.	Responsiveness of Proposal.....	15
34.	Nonconformities, Reparable Errors and Omissions.....	15
D.	AWARD OF CONTRACT.....	16
35.	Right to Accept, Reject, Any or All Proposals.....	16
36.	Award Criteria	16
37.	Right to Vary Requirements at the Time of Award.....	16
38.	Contract Signature	16
39.	Performance Security.....	16
40.	Bank Guarantee for Advanced Payment.....	16
41.	Liquidated Damages.....	16
42.	Payment Provisions.....	16
43.	Other Provisions.....	17
	Section 3. Bid Data Sheet.....	18
	Section 4. Evaluation Criteria.....	20
	Section 5. Terms of Reference.....	20
	Section 6: Returnable Bidding Forms / Checklist.....	32
	Form A: Technical Proposal Submission Form	33
	Form B: Bidder Information Form	35
	Form C: Joint Venture/Consortium/Association Information Form.....	37
	Form D: Qualificatio Form	38
	Form E: Format of Technical Proposal	40
	Form F: Financial Proposal Submission Form.....	46
	Form G: Financial Proposal Form	46

Section 1. Letter of Invitation

The International Solar Alliance (ISA) hereby invites you to submit a Proposal to this Request for Proposal (RFP) for the above-referenced subject.

This RFP includes the following documents and the General Terms and Conditions of Contract which is inserted in the Bid Data Sheet (BDS):

- Section 1: This Letter of Invitation
- Section 2: Instruction to Bidders
- Section 3: Bid Data Sheet (BDS)
- Section 4: Evaluation Criteria
- Section 5: Terms of Reference
- Section 6: Returnable Bidding Forms

- Form A: Technical Proposal Submission Form
- Form B: Bidder Information Form
- Form C: Joint Venture/Consortium/Association Information Form (Not Applicable)
- Form D: Qualification Form
- Form E: Format of Technical Proposal
- Form F: Financial Proposal Submission Form
- Form G: Financial Proposal Form

If you are interested in submitting a Proposal in response to this RFP, please prepare your Proposal in accordance with the requirements and procedure as set out in this RFP and submit it by the Deadline for Submission of Proposals set out in Bid Data Sheet.

Please acknowledge receipt of this RFP by sending an email to procurement@isolaralliance.org , indicating whether you intend to submit a Proposal or otherwise. You may send the Technical Proposal and the Financial Proposal files separately. The financial proposal shall be encrypted with password and clearly labelled. Any Amendments to the RFP will be notified on ISA Website. Should you require further clarifications, kindly communicate with the contact person/s identified in the attached Bid Data Sheet as the focal point for queries on this RFP.

ISA looks forward to receiving your Proposal and thank you in advance for your interest in ISA procurement opportunities.

Issued by: Vishal Pratap

Name:

Title: Procurement Unit

Date: December 01, 2023

Section 2. Instruction to Bidders

GENERAL PROVISIONS	
1. Introduction	<p>1.1 Bidders shall adhere to all the requirements of this RFP, including any amendments in Writing by ISA.</p> <p>1.2 Any Proposal submitted will be regarded as an offer by the Bidder and does not constitute or imply the acceptance of the Proposal by ISA. ISA is under no obligation to award a contract to any Bidder as a result of this RFP.</p>
2. Fraud & Corruption, Gifts and Hospitality	<p>2.1 ISA strictly enforces a policy of zero tolerance on proscribed practices, including fraud, corruption, collusion, unethical or unprofessional practices, and obstruction of ISA vendors and requires all bidders/vendors observe the highest standard of ethics during the procurement process and contract implementation.</p> <p>2.2 Bidders/vendors shall not offer gifts or hospitality of any kind to ISA staff members including recreational trips to sporting or cultural events, theme parks or offers of holidays, transportation, or invitations to extravagant lunches or dinners.</p> <p>2.3 In pursuance of this policy, ISA (a) Shall reject a proposal if it determines that the selected bidder has engaged in any corrupt or fraudulent practices in competing for the contract in question; (b) Shall declare a vendor ineligible, either indefinitely or for a stated period of time, to be awarded a contract if at any time it determines that the vendor has engaged in any corrupt or fraudulent practices in competing for, or in executing a ISA contract.</p> <p>2.4 All Bidders must adhere to the ISA Supplier Code of Conduct, which may be found at https://isolaralliance.org/images/ISA%20Supplier%20Code%20of%20Conduct_14.4.2023.final%20version.pdf</p>
3. Eligibility	<p>3.1 A vendor should not be suspended, debarred, or otherwise identified as ineligible by any UN Organization or the World Bank Group or any other international Organization. Vendors are therefore required to disclose to ISA whether they are subject to any sanction or temporary suspension imposed by these organizations.</p> <p>3.2 It is the Bidder's responsibility to ensure that its employees, joint venture members, sub-contractors, service providers, suppliers and/or their employees meet the eligibility requirements as established by ISA.</p>
4. Conflict of Interests	<p>4.1 Bidders must strictly avoid conflicts with other assignments or their own interests, and act without consideration for future work. Bidders found to have a conflict of interest shall be disqualified. Without limitation on the generality of the above, Bidders, and any of their affiliates, shall be</p>

	<p>considered to have a conflict of interest with one or more parties in this solicitation process, if they:</p> <ul style="list-style-type: none"> a) Are or have been associated in the past, with a firm or any of its affiliates which have been engaged by ISA to provide services for the preparation of the design, specifications, Terms of Reference, cost analysis/estimation, and other documents to be used for the procurement of the goods and services in this selection process; b) Were involved in the preparation and/or design of the programme/project related to the services requested under this RFP; or c) Are found to be in conflict for any other reason, as may be established by, or at the discretion of ISA. <p>4.2 In the event of any uncertainty in the interpretation of a potential conflict of interest, Bidders must disclose to ISA, and seek ISA’s confirmation on whether or not such a conflict exists. The ISA shall have the discretion to disqualify or proceed with a bidder where there is a probable conflict of interest subject to further evaluation and review of various factors such as access to sensitive information which may confer unfair advantage as against other bidders. The decision on a probable conflict of interest shall be made in the best interest of the work of the ISA.</p> <p>4.3 Similarly, the Bidders must disclose in their proposal their knowledge of the following:</p> <ul style="list-style-type: none"> a) If the owners, part-owners, officers, directors, controlling shareholders, of the bidding entity or key personnel are family members of ISA staff involved in the procurement functions and/or the Government of the country or any Implementing Partner receiving services under this RFP; and b) All other circumstances that could potentially lead to actual or perceived conflict of interest, collusion or unfair competition practices. <p>Failure to disclose such an information may result in the rejection of the proposal or proposals affected by the non-disclosure.</p> <p>4.4 The eligibility of Bidders that are wholly or partly owned by the Government shall be subject to ISA’s further evaluation and review of various factors such as being registered, operated and managed as an independent business entity, the extent of Government ownership/share, receipt of subsidies, mandate and access to information in relation to this RFP, among others. Conditions that may lead to undue advantage against other Bidders may result in the eventual rejection of the Proposal.</p>
PREPARATION OF PROPOSALS	
<p>5. General Considerations</p>	<p>5.1 In preparing the Proposal, the Bidder is expected to examine the RFP in detail. Material deficiencies in providing the information requested in the RFP may result in rejection of the Proposal.</p> <p>5.2 The Bidder will not be permitted to take advantage of any errors or omissions in the RFP. Should such errors or omissions be discovered, the</p>

	Bidder must notify the ISA
6. Cost of Preparation of Proposal	6.1 The Bidder shall bear any and all costs related to the preparation and/or submission of the Proposal, regardless of whether its Proposal was selected or not. ISA shall not be responsible or liable for those costs, regardless of the conduct or outcome of the procurement process.
7. Language	7.1 The Proposal, as well as any and all related correspondence exchanged by the Bidder and ISA, shall be Written in the language (s) specified in the BDS.
8. Documents Comprising the Proposal	8.1 The Proposal shall comprise of the following documents: c) Documents Establishing the Eligibility and Qualifications of the Bidder; d) Technical Proposal; e) Financial Proposal; f) Proposal Security, if required by BDS; g) Any attachments and/or appendices to the Proposal.
9. Documents Establishing the Eligibility and Qualifications of the Bidder	9.1 The Bidder shall furnish documentary evidence of its status as an eligible and qualified vendor, using the Forms provided under Section 6 and providing documents required in those forms. In order to award a contract to a Bidder, its qualifications must be documented to ISA’s satisfaction.
10. Technical Proposal Format and Content	10.1 The Bidder is required to submit a Technical Proposal using the Standard Forms and templates provided in Section 6 of the RFP. 10.2 The Technical Proposal shall not include any price or financial information. A Technical Proposal containing material financial information may be declared non-responsive. 10.3 Samples of items, when required as per Section 5, shall be provided within the time specified and unless otherwise specified by ISA, and at no expense to ISA 10.4 When applicable and required as per Section 5, the Bidder shall describe the necessary training programme available for the maintenance and operation of the services and/or equipment offered as well as the cost to the ISA. Unless otherwise specified, such training as well as training materials shall be provided in the language of the Bid as specified in the BDS.
11. Financial Proposals	11.1 The Financial Proposal shall be prepared using the Standard Form provided in Section 6 of the RFP. It shall list all major cost components associated with the services, and the detailed breakdown of such costs. 11.2 Any output and activities described in the Technical Proposal but not priced in the Financial Proposal, shall be assumed to be included in the prices of other activities or items, as well as in the final total price. 11.3 Prices and other financial information must not be disclosed in any other

	place except in the financial proposal.
12. Proposal Security	<p>12.1 A Proposal Security, if required by BDS, shall be provided in the amount and form indicated in the BDS. The Proposal Security shall be valid up to thirty (30) days after the final date of validity of the Proposal.</p> <p>12.2 The Proposal Security shall be included along with the Technical Proposal. If Proposal Security is required by the RFP but is not found along with the Technical Proposal, the Proposal shall be rejected.</p> <p>12.3 If the Proposal Security amount or its validity period is found to be less than what is required by ISA, ISA shall reject the Proposal.</p> <p>12.4 In the event an electronic submission is allowed in the BDS, Bidders shall include a copy of the Bid Security in their proposal and the original of the Proposal Security must be sent via courier or hand delivery as per the instructions in BDS.</p> <p>12.5 The Proposal Security may be forfeited by ISA, and the Proposal rejected, in the event of any one or combination, of the following conditions:</p> <ul style="list-style-type: none"> a) If the Bidder withdraws its offer during the period of the Proposal Validity specified in the BDS, or; b) In the event that the successful Bidder fails: <ul style="list-style-type: none"> i. to sign the Contract after ISA has issued an award; or ii. to furnish the Performance Security, insurances, or other documents that ISA may require as a condition precedent to the effectivity of the contract that may be awarded to the Bidder.
13. Currencies	<p>13.1 All prices shall be quoted in the currency or currencies indicated in the BDS. Where Proposals are quoted in different currencies, for the purposes of comparison of all Proposals:</p> <ul style="list-style-type: none"> a) ISA will convert the currency quoted in the Proposal into the ISA preferred currency, in accordance with the prevailing UN operational rate of exchange on the last day of submission of Proposals; and b) In the event that ISA selects a proposal for award that is quoted in a currency different from the preferred currency in the BDS, ISA shall reserve the right to award the contract in the currency of ISA's preference, using the conversion method specified above.
14. Joint Venture, Consortium or Association	<p>14.1 If the Bidder is a group of legal entities that will form or have formed a Joint Venture (JV), Consortium or Association for the Proposal, they shall confirm in their Proposal that : (i) they have designated one party to act as a lead entity, duly vested with authority to legally bind the members of the JV, Consortium or Association jointly and severally, which shall be evidenced by a duly notarized Agreement among the legal entities, and submitted with the Proposal; and (ii) if they are awarded the contract, the contract shall be entered into, by and between ISA and the designated lead entity, who shall be acting for and on behalf of all the member entities</p>

	<p>comprising the joint venture.</p> <p>14.2 After the Deadline for Submission of Proposal, the lead entity identified to represent the JV, Consortium or Association shall not be altered without the prior written consent of ISA.</p> <p>14.3 The lead entity and the member entities of the JV, Consortium or Association shall abide by the provisions of Clause 15 herein in respect of submitting only one proposal.</p> <p>14.4 The description of the organization of the JV, Consortium or Association must clearly define the expected role of each of the entity in the joint venture in delivering the requirements of the RFP, both in the Proposal and the JV, Consortium or Association Agreement. All entities that comprise the JV, Consortium or Association shall be subject to the eligibility and qualification assessment by ISA.</p> <p>14.5 A JV, Consortium or Association in presenting its track record and experience should clearly differentiate between:</p> <ul style="list-style-type: none"> a) Those that were undertaken together by the JV, Consortium or Association; and b) Those that were undertaken by the individual entities of the JV, Consortium or Association. <p>14.6 Previous contracts completed by individual experts working privately but who are permanently or were temporarily associated with any of the member firms cannot be claimed as the experience of the JV, Consortium or Association or those of its members, but should only be claimed by the individual experts themselves in their presentation of their individual credentials.</p> <p>JV, Consortium or Associations are encouraged for high value, multi-sectoral requirements when the spectrum of expertise and resources required may not be available within one firm.</p>
<p>15.Only One Proposal</p>	<p>15.1 The Bidder (including the individual members of any Joint Venture) shall submit only one Proposal, either in its own name or as part of a Joint Venture.</p> <p>15.2 Proposals submitted by two (2) or more Bidders shall all be rejected if they are found to have any of the following:</p> <ul style="list-style-type: none"> h) they have at least one controlling partner, director or shareholder in common; or i) any one of them receive or have received any direct or indirect subsidy from the other/s; or j) they have the same legal representative for purposes of this RFP; or k) they have a relationship with each other, directly or through common third parties, that puts them in a position to have access to information

	<p>about, or influence on the Proposal of, another Bidder regarding this RFP process;</p> <p>l) they are subcontractors to each other’s Proposal, or a subcontractor to one Proposal also submits another Proposal under its name as lead Bidder; or</p> <p>m) some key personnel proposed to be in the team of one Bidder participates in more than one Proposal received for this RFP process. This condition relating to the personnel, does not apply to subcontractors being included in more than one Proposal.</p>
<p>16.Proposal Validity Period</p>	<p>16.1 Proposals shall remain valid for the period specified in the BDS, commencing on the Deadline for Submission of Proposals. A Proposal valid for a shorter period may be rejected by ISA and rendered non-responsive.</p> <p>16.2 During the Proposal validity period, the Bidder shall maintain its original Proposal without any change, including the availability of the Key Personnel, the proposed rates and the total price.</p>
<p>17.Extension of Proposal Validity Period</p>	<p>17.1 In exceptional circumstances, prior to the expiration of the proposal validity period, ISA may request Bidders to extend the period of validity of their Proposals. The request and the responses shall be made in writing, and shall be considered integral to the Proposal.</p> <p>17.2 If the Bidder agrees to extend the validity of its Proposal, it shall be done without any change in the original Proposal.</p> <p>17.3 The Bidder has the right to refuse to extend the validity of its Proposal, and in which case, such Proposal will not be further evaluated.</p>
<p>18.Clarification of Proposal</p>	<p>18.1 Bidders may request clarifications on any of the RFP documents no later than the date indicated in the BDS. Any request for clarification must be sent in writing in the manner indicated in the BDS. If inquiries are sent other than specified channel, even if they are sent to an ISA staff member, ISA shall have no obligation to respond or confirm that the query was officially received.</p> <p>18.2 ISA will provide the responses to clarifications through the method specified in the BDS.</p> <p>18.3 ISA shall endeavor to provide responses to clarifications in an expeditious manner, but any delay in such response shall not cause an obligation on the part of ISA to extend the submission date of the Proposals, unless ISA deems that such an extension is justified and necessary.</p>
<p>19.Amendment of Proposals</p>	<p>19.1 At any time prior to the deadline of Proposal submission, ISA may for any reason, such as in response to a clarification requested by a Bidder, modify the RFP in the form of an amendment to the RFP. Amendments will be made available to all prospective bidders.</p> <p>19.2 If the amendment is substantial, ISA may extend the Deadline for submission of proposal to give the Bidders reasonable time to incorporate</p>

	the amendment into their Proposals.
20.Alternative Proposals	<p>20.1 Unless otherwise specified in the BDS, alternative proposals shall not be considered. If submission of alternative proposal is allowed by BDS, a Bidder may submit an alternative proposal, but only if it also submits a proposal conforming to the RFP requirements. ISA shall only consider the alternative proposal offered by the Bidder whose conforming proposal ranked the highest as per the specified evaluation method. Where the conditions for its acceptance are met, or justifications are clearly established, ISA reserves the right to award a contract based on an alternative proposal.</p> <p>20.2 If multiple/alternative proposals are being submitted, they must be clearly marked as “Main Proposal” and “Alternative Proposal”</p>
21.Pre-Bid Conference	<p>21.1 When appropriate, a Bidder’s conference will be conducted at the date, time and location specified in the BDS. All Bidders are encouraged to attend. Non-attendance, however, shall not result in disqualification of an interested Bidder. Minutes of the Bidder’s conference will be sent to all the participants of the pre-bid conference. No verbal statement made during the conference shall modify the terms and conditions of the RFP, unless specifically incorporated in the Minutes of the Bidder’s Conference or issued/posted as an amendment to RFP.</p>
SUBMISSION AND OPENING OF PROPOSALS	
22.Submission	<p>22.1 The Bidder shall submit a duly signed and complete Proposal comprising the documents and forms in accordance with the requirements in the BDS. The submission shall be in the manner specified in the BDS.</p> <p>22.2 The Proposal shall be signed by the Bidder or person(s) duly authorized to commit the Bidder. The authorization shall be communicated through a document evidencing such authorization issued by the legal representative of the bidding entity, or a Power of Attorney, accompanying the Proposal.</p> <p>22.3 Bidders must be aware that the mere act of submission of a Proposal, in and of itself, implies that the Bidder fully accepts the ISA General Contract Terms and Conditions. https://www.isoalliance.org/images/ISA_GTB.pdf</p>
Email Submission	<p>22.4 Email submission, if allowed or specified in the BDS, shall be governed as follows:</p> <ul style="list-style-type: none"> a) Electronic files that form part of the proposal must be in accordance with the format and requirements indicated in BDS; b) The Technical Proposal and the Financial Proposal files MUST BE COMPLETELY SEPARATE. The financial proposal shall be encrypted with password and clearly labelled. The files must be sent to the dedicated email address specified in the BDS.

	<p>c) The password for opening the Financial Proposal should be provided only upon request of ISA. ISA will request password only from bidders whose Technical Proposal has been found to be technically responsive. Failure to provide correct password may result in the proposal being rejected.</p>
23. Deadline for Submission of Proposals and Late Proposals	<p>23.1 Complete Proposals must be received by ISA in the manner, and no later than the date and time, specified in the BDS. ISA shall only recognize the date and time that the bid was received by ISA</p> <p>23.2 ISA shall not consider any Proposal that is submitted after the deadline for the submission of Proposals.</p>
24. Withdrawal, Substitution, and Modification of Proposals	<p>24.1 A Bidder may withdraw, substitute or modify its Proposal after it has been submitted at any time prior to the deadline for submission.</p> <p>24.2 Manual and Email submissions: A bidder may withdraw, substitute or modify its Proposal by sending a written notice to ISA, duly signed by an authorized representative, and shall include a copy of the authorization (or a Power of Attorney). The corresponding substitution or modification of the Proposal, if any, must accompany the respective written notice. All notices must be submitted in the same manner as specified for submission of proposals, by clearly marking them as "WITHDRAWAL" "SUBSTITUTION," or "MODIFICATION"</p> <p>24.3 Proposals requested to be withdrawn shall be returned unopened to the Bidders, only for manual submissions. For online submissions, bids will be disregarded by ISA.</p>
25. Proposal Opening	<p>25.1 There is no public bid opening for RFPs. ISA shall open the Proposals in the presence of an ad-hoc committee formed by ISA, consisting of at least two (2) members.</p>
EVALUATION OF PROPOSALS	
26. Confidentiality	<p>26.1 Information relating to the examination, evaluation, and comparison of Proposals, and the recommendation of contract award, shall not be disclosed to Bidders or any other persons not officially concerned with such process, even after publication of the contract award.</p> <p>26.2 Any effort by a Bidder or anyone on behalf of the Bidder to influence ISA in the examination, evaluation and comparison of the Proposals or contract award decisions may, at ISA's decision, result in the rejection of its Proposal and may be subject to the application of prevailing ISA vendor sanctions procedures.</p>
27. Evaluation of Proposals	<p>27.1 The Bidder is not permitted to alter or modify its Proposal in any way after the proposal submission deadline except as permitted under Clause 24 of this RFP. ISA will conduct the evaluation solely on the basis of the submitted Technical and Financial Proposals.</p> <p>27.2 Evaluation of proposals is made of the following steps:</p>

	<ul style="list-style-type: none"> n) Preliminary Examination o) Minimum Eligibility and Qualification (if pre-qualification is not done) p) Evaluation of Technical Proposals q) Evaluation of Financial Proposals
<p>28.Preliminary Examination</p>	<p>28.1 ISA shall examine the Proposals to determine whether they are complete with respect to minimum documentary requirements, whether the documents have been properly signed, and whether the Proposals are generally in order, among other indicators that may be used at this stage. ISA reserves the right to reject any Proposal at this stage.</p>
<p>29.Evaluation of Eligibility and Qualification</p>	<p>B. Eligibility and Qualification of the Bidder will be evaluated against the Minimum Eligibility/Qualification requirements specified in the Section 4 (Evaluation Criteria).</p> <p>C. In general terms, vendors that meet the following criteria may be considered qualified:</p> <ul style="list-style-type: none"> i. They are not included in the UN Security Council 1267/1989 Committee's list of terrorists and terrorist financiers. ii. They have a good financial standing and have access to adequate financial resources to perform the contract and all existing commercial commitments, iii. They have the necessary similar experience, technical expertise, production capacity where applicable, quality certifications, quality assurance procedures and other resources applicable to the provision of the services required; iv. They are able to comply fully with ISA General Terms and Conditions of Contract; v. They do not have a consistent history of court/arbitral award decisions against the Bidder; and vi. They have a record of timely and satisfactory performance with their clients. vii. The consulting firm should provide credentials, through adequate references or documentation, their current local presence in the ISA focus regions. Past experience of working with ISA and/or with multilateral/international organizations will be an added advantage.
<p>30.Evaluation of Technical and Financial Proposals</p>	<p>30.1 The evaluation team shall review and evaluate the Technical Proposals on the basis of their responsiveness to the Terms of Reference and other RFP documents, applying the evaluation criteria, sub-criteria, and point system specified in the Section 4 (Evaluation Criteria). A Proposal shall be rendered non-responsive at the technical evaluation stage if it fails to achieve the minimum technical score indicated in the BDS. When necessary and if stated in the BDS, ISA may invite technically responsive bidders for a presentation related to their technical proposals. The conditions for the presentation shall be provided in the bid document where required.</p> <p>30.2 In the second stage, only the Financial Proposals of those Bidders who achieve the minimum technical score will be opened for evaluation. The</p>

Financial Proposals corresponding to Technical Proposals that were rendered non-responsive shall remain unopened, and, in the case of manual submission, be returned to the Bidder unopened. For emailed Proposals submissions, ISA will not request for the password of the Financial Proposals of bidders whose Technical Proposal were found not responsive.

30.3 The evaluation method that applies for this RFP shall be as indicated in the BDS, which may be either of two (2) possible methods, as follows: (a) the lowest priced method which selects the lowest evaluated financial proposal of the technically responsive Bidders; or (b) the combined scoring method which will be based on a combination of the technical and financial score.

30.4 When the BDS specifies a combined scoring method, the formula for the rating of the Proposals will be as follows:

Rating the Technical Proposal (TP):

TP Rating = (Total Score Obtained by the Offer / Max. Obtainable Score for TP) x 100

Rating the Financial Proposal (FP):

FP Rating = (Lowest Priced Offer / Price of the Offer Being Reviewed) x 100

Total Combined Score:

Combined Score = (TP Rating) x (Weight of TP, e.g. 70%/100) + (FP Rating) x (Weight of FP, e.g., 30%/100)

31. Due Diligence

31.1 ISA reserves the right to undertake a due diligence exercise, also called post qualification, aimed at determining to its satisfaction, the validity of the information provided by the Bidder. Such exercise shall be fully documented and may include, but need not be limited to, all or any combination of the following:

- a) Verification of accuracy, correctness and authenticity of information provided by the Bidder;
- b) Validation of extent of compliance to the RFP requirements and evaluation criteria based on what has so far been found by the evaluation team;
- c) Inquiry and reference checking with Government entities with jurisdiction on the Bidder, or with previous clients, or any other entity that may have done business with the Bidder;
- d) Inquiry and reference checking with previous clients on the

	<p>performance on on-going or contracts completed, including physical inspections of previous works, as necessary;</p> <ul style="list-style-type: none"> e) Physical inspection of the Bidder’s offices, branches or other places where business transpires, with or without notice to the Bidder; f) Other means that ISA may deem appropriate, at any stage within the selection process, prior to awarding the contract.
<p>32. Clarification of Proposals</p>	<p>32.1 To assist in the examination, evaluation and comparison of Proposals, ISA may, at its discretion, ask any Bidder for a clarification of its Proposal.</p> <p>32.2 ISA’s request for clarification and the response shall be in writing and no change in the prices or substance of the Proposal shall be sought, offered, or permitted, except to provide clarification, and confirm the correction of any arithmetic errors discovered by ISA in the evaluation of the Proposals, in accordance with RFP.</p> <p>32.3 Any unsolicited clarification submitted by a Bidder in respect to its Proposal, which is not a response to a request by ISA, shall not be considered during the review and evaluation of the Proposals.</p>
<p>33. Responsiveness of Proposal</p>	<p>33.1 ISA’s determination of a Proposal’s responsiveness will be based on the contents of the Proposal itself. A substantially responsive Proposal is one that conforms to all the terms, conditions, TOR and other requirements of the RFP without material deviation, reservation, or omission.</p> <p>33.2 If a Proposal is not substantially responsive, it shall be rejected by ISA and may not subsequently be made responsive by the Bidder by correction of the material deviation, reservation, or omission.</p>
<p>34. Nonconformities, Repairable Errors and Omissions</p>	<p>34.1 Provided that a Proposal is substantially responsive, ISA may waive any non-conformities or omissions in the Proposal that, in the opinion of ISA, do not constitute a material deviation.</p> <p>34.2 ISA may request the Bidder to submit the necessary information or documentation, within a reasonable period of time, to rectify nonmaterial nonconformities or omissions in the Proposal related to documentation requirements. Such omission shall not be related to any aspect of the price of the Proposal. Failure of the Bidder to comply with the request may result in the rejection of its Proposal.</p> <p>34.3 For Financial Proposal that has been opened, ISA shall check and correct arithmetical errors as follows:</p> <ul style="list-style-type: none"> a) if there is a discrepancy between the unit price and the line item total that is obtained by multiplying the unit price by the quantity, the unit price shall prevail and the line item total shall be corrected, unless in the opinion of ISA there is an obvious misplacement of the decimal point in the unit price; in which case the line item total as quoted shall govern and the unit price shall be corrected; b) if there is an error in a total corresponding to the addition or subtraction of subtotals, the subtotals shall prevail, and the total

	<p>shall be corrected; and</p> <p>c) if there is a discrepancy between words and figures, the amount in words shall prevail, unless the amount expressed in words is related to an arithmetic error, in which case the amount in figures shall prevail.</p> <p>34.4 If the Bidder does not accept the correction of errors made by ISA, its Proposal shall be rejected.</p>
D. AWARD OF CONTRACT	
35.Right to Accept, Reject, Any or All Proposals	35.1 ISA reserves the right to accept or reject any Proposal, to render any or all of the Proposals as non-responsive, and to reject all Proposals at any time prior to award of contract, without incurring any liability, or obligation to inform the affected Bidder(s) of the grounds for ISA’s action. ISA shall not be obliged to award the contract to the lowest priced offer.
36.Award Criteria	36.1 Prior to expiration of the proposal validity, ISA shall award the contract to the qualified Bidder based on the award criteria indicated in the BDS.
37.Right to Vary Requirements at the Time of Award	37.1 At the time of award of Contract, ISA reserves the right to vary the quantity of services and/or goods, by up to a maximum twenty-five per cent (25%) of the total offer, without any change in the unit price or other terms and conditions.
38.Contract Signature	38.1 Within fifteen (15) days from the date of receipt of the Contract, the successful Bidder shall sign and date the Contract and return it to ISA. Failure to do so may constitute sufficient grounds for the annulment of the award, and forfeiture of the Proposal Security, if any, and on which event, ISA may award the Contract to the Second Ranked Bidder or call for new Proposals.
39.Performance Security	39.1 A performance security, if required in BDS, shall be provided in the amount specified in BDS. Within fifteen (15) days of the contract signature by both parties. Where a performance security is required, the receipt of the performance security by ISA shall be a condition for rendering the contract effective.
40.Bank Guarantee for Advanced Payment	40.1 Except when the interests of ISA so require, it is ISA’s preference to make no advance payment(s) (i.e., payments without having received any outputs). If an advance payment is allowed as per BDS, and exceeds 20% of the total contract price, or USD 30,000, whichever is less, the Bidder shall submit a Bank Guarantee in the full amount of the advance payment.
41.Liquidated Damages	41.1 If specified in BDS, ISA shall apply Liquidated Damages resulting from the Contractor’s delays or breach of its obligations as per the Contract.
42.Payment Provisions	42.1 Payment will be made only upon ISA's acceptance of the work performed. The terms of payment shall be within thirty (30) days, after receipt of invoice and certification of acceptance of work issued by the proper

	authority in ISA with direct supervision of the Contractor. Payment will be affected by bank transfer in the currency of contract.
43.Other Provisions	<p>43.1 ISA may withdraw the RFP at any time by providing written notice to the bidder in any case in which the mandate of ISA applicable to the performance of the Contract or the funding of ISA applicable to the RFP is curtailed or terminated, whether in whole or in part.</p> <p>43.2. The ISA is striving to achieve gender parity in all its activities. In this regard, female-owned organizations and/or teams with significant gender diversity are strongly encouraged to submit a proposal.</p> <p>43.3. The ISA recognizes the importance of valuing diversity and promoting inclusion in all our work programs and partnerships. The ISA strives to engage with organizations and/or teams that reflect its geographical representation and diversity.</p>

Section 3. Bid Data Sheet

The following data for the services to be procured shall complement, supplement, or amend the provisions in the Request for Proposals. In the case of a conflict between the Instructions to Bidders, the Data Sheet, and other annexes or references attached to the Data Sheet, the provisions in the Data Sheet shall prevail.

BDS No.	Ref. to Section.2	Data	Specific Instructions / Requirements
1	7	Language of the Proposal	English
2		Submitting Proposals for Parts or sub-parts of the TOR (partial bids)	Not Allowed
3	20	Alternative Proposals	Shall not be considered
4	21	Pre-proposal conference	May be scheduled on demand
5	10	Proposal Validity Period	90 days
6	14	Bid Security	NIL
7	41	Advanced Payment upon signing of contract	Not Allowed
8	42	Liquidated Damages	Will be imposed as follows: Provide details below if "Will be Imposed" is selected, otherwise delete the below 0.1% of contract price per day of delay Max. number of days of delay 15, (1.5% of contract amount) after which ISA may terminate the contract.
9	40	Performance Security	Not Required
10	18	Currency of Proposal	USD
11	31	Deadline for submitting requests for	5 days before the submission deadline

		clarifications/ questions	
12	31	Contact Details for submitting clarifications/questions	<p>Focal Person in ISA: Procurement Unit</p> <p>E-mail: procurement@isolaralliance.org and CC to Mr. Nar Bahadur Khatiwora nkhatiwora@isolaralliance.org</p> <p>Address: International Solar Alliance, 3rd Floor, Surya Bhawan, NISE Campus, Gwal Pahari, Gurugram, Haryana - 122003, India</p>
13	18, 19 and 21	Manner of Disseminating Supplemental Information to the RFP and responses/clarifications to queries	<p>Direct communication to prospective Proposers by email</p> <p>E-mail: procurement@isolaralliance.org and CC to Mr. Nar Bahadur Khatiwora nkhatiwora@isolaralliance.org</p>
14	23	Deadline for Submission	December 22, 2023 - 7.00 PM (Indian Standard Time)
14	22	Allowable Manner of Submitting Proposals	<input type="checkbox"/> Submission by email
15	22	Proposal Submission Address	E-mail: procurement@isolaralliance.org
16	22	Electronic submission (email) requirements	<ul style="list-style-type: none"> ▪ Format: PDF files only ▪ File names must be maximum 60 characters long and must not contain any letter or special character other than from Latin alphabet/keyboard. ▪ All files must be free of viruses and not corrupted. ▪ Password for financial proposal <u>must</u> not be provided to ISA until requested by ISA ▪ Max. File Size per transmission: 5 MB
17	27 36	Evaluation Method for the Award of Contract	<p>Combined Scoring Method, using the 70%-30% distribution for technical and financial proposals respectively</p> <p>The minimum technical score required to pass is 60%.</p>
18		Expected date for commencement of Contract	January, 2024
19		Maximum expected duration of contract	The Project deliverables are expected to be completed within 18 weeks from the commencement of the contract.

20	35	ISA will award the contract to:	One Proposer only
21	39	Type of Contract	Services contract
22		Other Information Related to the RFP	[All other instructions and information not yet mentioned so far in this Data Sheet but are relevant to the RFP must be cited here, and any further entries that may be added below this table row]

Section 4. Evaluation Criteria

Preliminary Examination Criteria

Proposals will be examined to determine whether they are complete and submitted in accordance with RFP requirements as per below criteria on a Yes/No basis:

- Appropriate signatures
- Power of Attorney
- Minimum documents provided
- Technical and Financial Proposals submitted separately
- Bid Validity
- Bid Security submitted as per RFP requirements with compliant validity period

Minimum Eligibility and Qualification Criteria

Eligibility and Qualification will be evaluated on Pass/Fail basis.

Subject	Criteria	Document Submission requirement
ELIGIBILITY		
Legal Status	A bidder is a legally registered entity/firm with not less than 12 years in service. JV/Consortium is allowed under this contract, but sub-contracting is not allowed.	Form B: Bidder Information Form
Eligibility	Bidder is not suspended, nor debarred, nor otherwise identified as ineligible by any UN Organization, ADB or the World Bank Group or any other international Organization in accordance with ITB clause 3.	Form A: Technical Proposal Submission Form
Conflict of Interest	No conflicts of interest in accordance with clause 4.	Form A: Technical Proposal Submission Form
Bankruptcy	Not declared bankruptcy, not involved in bankruptcy or receivership proceedings, and there is no judgment or pending legal action against the Bidder that could impair its operations in the foreseeable future.	Form A: Technical Proposal Submission Form
QUALIFICATION		
History of Non-Performing Contracts¹	Non-performance of a contract did not occur as a result of contractor default for the last 3 years.	Form D: Qualification Form

¹ Non-performance, as decided by ISA, shall include all contracts where (a) non-performance was not challenged by the contractor,

Litigation History	No consistent history of court/arbitral award decisions against the Bidder for the last 3 years.			Form D: Qualification Form
Previous Experience	Sl. No.	Criteria	Documents required	Form D: Qualification Form (Previous Relevant Experience)
	1.	Minimum 12 years' experience in the solar energy sector.	Provide Copies of work orders and a summary of the work.	
	2.	At least 10 projects were completed in the solar sector, with a focus on policy, technology and regulatory study of developing and least developed countries, out of which at least 3 projects must be in the solar thermal application. Please provide the details of the assignments.	(Work order or details of the assignment)	
	3.	Experience in conducting country-level business planning and study for solar heating and cooling technology – at least 3 assignments successfully completed.	(Work order or details of the assignment)	
Financial Standing	Minimum average annual turnover of US\$ Fifty Thousand for the last 3 years			Form D: Qualification Form
	Bidder must demonstrate the current soundness of its financial standing and indicate its prospective long-term profitability.			Form D: Qualification Form

Technical Proposals of Bidders who pass the minimum eligibility criteria will be evaluated.

including through referral to the dispute resolution mechanism under the respective contract, and (b) contracts that were so challenged but fully settled against the contractor. Non-performance shall not include contracts where Employers decision was overruled by the dispute resolution mechanism. Non-performance must be based on all information on fully settled disputes or litigation, i.e. dispute or litigation that has been resolved in accordance with the dispute resolution mechanism under the respective contract and where all appeal instances available to the Bidder have been exhausted.

Technical and Financial Evaluation Criteria

Summary of Technical Proposal Evaluation Forms		Points Obtainable
1.	<p>Bidder's qualification, capacity and experience</p> <ul style="list-style-type: none"> • At least 10 projects completed in the solar sector, with a focus on policy and regulatory study of developing and least developed countries, out of which at least 3 in solar thermal applications. (100) • Experience in conducting country-level policies, business planning and study for solar heating and cooling applications, at least 3 assignments completed (50) • Experience working with a range of solar heating and solar cooling technologies, including but not limited to solar thermal collectors, absorption chillers, and thermal energy storage systems (50) 	200
2.	Proposed Methodology, Approach and Implementation Plan	500
3.	<p>Management Structure and Qualification of Key Personnel*</p> <ul style="list-style-type: none"> • The team leader should have <ul style="list-style-type: none"> ○ Minimum bachelor's degree in Engineering or master's degree in RE/Finance/Economics/Business. ○ Minimum of 12 years experience with a Master's Degree or 15 years' experience with a Bachelor's degree working for business planning, roadmap development etc in the energy sector • The Finance Expert should have <ul style="list-style-type: none"> ○ Minimum Graduate in Engineering/Commerce/Economics/Finance/ Business or Master's in Economics, Finance, or Development Studies. ○ Minimum 7 years of work experience in business development/ marketing/ product development on renewable energy. • The Renewable Energy (RE) Expert should have <ul style="list-style-type: none"> ○ Minimum a Bachelor's in Engineering or Master's in Environment/Energy/ Sustainable Development. ○ Minimum 7 years of work experience in solar energy sector. <p>* The bidder can propose more personnel in addition to the above listed roles.</p>	300
	Total	1000

Section 1. Bidder's qualification, capacity and experience		Points obtainable
1.1	References of similar projects undertaken by the organisation over the last twelve years	100
1.2	General Organizational Capability which is likely to affect implementation: management structure, financial stability and project financing capacity, project management controls, the extent to which any work would be subcontracted	50
1.3	Experience in similar engagements with UN agencies, Government agencies or Bilateral organisations.	50
Total Section 1		200
Section 2. Proposed Methodology, Approach and Implementation Plan		Points obtainable
2.1	Understanding of the requirement: Have the important aspects of the task been addressed in sufficient detail? Feedback and suggestions on the TOR	100
2.2	Description of the bidder's approach and methodology for meeting or exceeding the requirements of the Terms of Reference?	150
2.3	Virtual presentation ² to ISA on firms' experiences, team capability and the details on how the information from the countries shall be collected, controlled, consolidated, presented and delivered in user-friendly ways (invited at a suitable time)	150
2.4	Does the methodology substantially address the context of activities, interventions, capacity building and knowledge sharing for better adoption of solar thermal technology in a country?	50
2.5	Assessment of the implementation plan proposed, including whether the activities are properly sequenced and if these are logical and realistic.	50
Total Section 2		500

Section 3. Management Structure and Key Personnel		Points obtainable
3.1	Composition and structure of the team proposed. Are the proposed roles of the management and the team of key personnel suitable for the provision of the necessary services?	100
3.2	Qualifications of key personnel proposed	200
3.2 a	Team Leader	80
	- General Experience	

² The selected bidders for the technical evaluation shall make a comprehensive presentation on a scheduled time, which will be communicated by the procurement team.

	- Specific Experience relevant to the assignment		
	- Regional/International experience		
	- Educational Qualification		
3.2 b	Team members		120
	- General Experience		
	- Specific Experience relevant to the assignment		
	- Regional/International experience		
	- Educational Qualification		
Total Section 3			300

Kindly provide against each point the reference page number where narration/proof of the response to the point is provided in the bid.

2 Section 5. Terms of Reference

1. Introduction

1.1. BRIEF BACKGROUND ABOUT INTERNATIONAL SOLAR ALLIANCE

The International Solar Alliance (ISA) is a global organisation of 116 member countries working to increase the deployment of solar energy technologies for improved energy access, energy security, and the facilitation of the energy transition. In order to assist the alliance in their collective work, a Secretariat has been established in India, which supports Member Countries in developing low-carbon growth trajectories. ISA works on the three strategic priority areas: i) Policy & Capacity Building, ii) Programmatic Support, and iii) Analytics & Advocacy. The ISA has established partnerships with multilateral development banks, development financial institutions, private and public sector organisations, civil society, and other international institutions to achieve its objectives.

Belief Context

Heating and cooling systems are responsible for a significant portion of global energy consumption and greenhouse gas emissions. According to the International Energy Agency, in 2020, space heating and cooling accounted for approximately 54% of final energy consumption in buildings worldwide, resulting in significant emissions of carbon dioxide (CO₂) and other greenhouse gases (GHGs)³. However, the adoption of renewable energy technologies, such as solar energy, can significantly reduce GHG emissions from heating and cooling systems. In particular, solar thermal systems can be used for heating and cooling applications, providing a clean and renewable energy source for buildings. A study conducted by the European Commission estimated that the use of solar thermal systems for heating and cooling in buildings could reduce GHG emissions by up to 47 million tonnes of CO₂ per year by 2030⁴.

The International Solar Alliance (ISA) is committed to promoting the adoption of solar thermal systems worldwide, with the goal of facilitating the deployment of 1,000 GW of solar energy by 2030, which would significantly reduce global GHG emissions to the tune of 1000 million tonnes annually. As a part of the nine comprehensive programmes, ISA is committed to promoting solar thermal systems with a specific focus on heating and cooling under Programme 7: Solarizing Heating and Cooling Systems. Under this programme, ISA is seeking a consultancy to develop a Comprehensive Programme Document outlining specific project interventions and the role of ISA in promoting solar heating and cooling systems in the member countries.

Proposal Summary

The ISA aims to develop a Comprehensive Programme Initiation Framework for the Solarization of Heating and Cooling Systems that ISA can use to accelerate the deployment of solar thermal systems for heating and cooling in member countries. It is envisioned that the programme will provide a clear roadmap for the

³ International Energy Agency (IEA). (2021). Energy Efficiency 2021 (<https://www.iea.org/reports/energy-efficiency-2021>)

⁴ European Commission. (2014). Renewable energy progress and biofuels sustainability report (<https://ec.europa.eu/energy/en/data-analysis/renewable-energy-progress-report-2014>)

development, deployment, and scaling of solar thermal systems. Further, key technologies, business models, policy and regulatory frameworks, capacity gaps, and recommendations on the list of activities will be identified that the ISA can undertake to support member countries in implementing solar thermal systems for heating and cooling.

Therefore, the specific objectives of the assignment are to

- Develop a comprehensive programme initiation document for ISA programme 7: Solarization of Heating and Cooling Systems
- Develop guidelines, system standards, operating protocol, approach, and methodology for promoting the adoption of solar heating and cooling applications
- Assist countries in developing a policy and regulatory framework for the deployment of solar technology for the purpose of heating and cooling
- Create a comprehensive knowledge repository to facilitate the sharing of skills and best practices in the domain of solar thermal-based heating and cooling systems across user segments.
- Enhance public and private sector involvement in the advancement, implementation, and expansion of solar thermal systems, emphasising applications related to heating and cooling.

Scope of Work

The scope of work for this consultancy would involve conducting a thorough review of existing literature, policies & regulations, industry stances and best practices related to solar thermal systems for heating and cooling. Based on the findings of the review, the consultant would develop a comprehensive programme that the ISA can use while working with the member countries to accelerate the deployment of solar thermal applications for heating and cooling. This would include the development of a clear roadmap outlining key technologies, business models, policy and regulatory frameworks, capacity-building initiatives, and recommendations for activities that the ISA can undertake to support member countries in implementing them. The consultant would work closely with the ISA to ensure that the programme aligns with the organisation's objectives and would provide regular updates and progress reports throughout the engagement period.

The detailed scope of work is outlined in the subsequent sections.

3 Review of Existing Documents, Information and Best Practices

The consultant will conduct an in-depth review of the existing documents and information related to solar heating and cooling technology and best practices from around the world. This will include literature reviews, reports, and case studies on the development, deployment and scaling of solar heating and cooling systems in different countries, including ISA member countries. The consultant will analyse and synthesise the information to identify key technologies, business models, policy and regulatory frameworks, capacity needs, and other factors that are critical for the successful deployment of solar heating and cooling systems. The consultant will provide a report summarising their findings, including recommendations for the most effective approaches to deploying solar heating and cooling systems in ISA member countries.

Specific tasks include to:

- Conduct a comprehensive review of existing documents and information related to solar heating and cooling systems, including literature reviews, reports, and case studies. The study should cover all the regions- Asia, America, Africa, Europe etc.
- Analyse and synthesise the information to identify key technologies, business models, policy and regulatory frameworks, success and failures, and other factors that are critical for the successful deployment of solar heating and cooling systems.
- Identify and collate the information on the entire range of products and technologies available in the global market and the products in various stages of development
- Prepare a report summarising the findings of the review and provide recommendations for the most effective approaches for deploying solar heating and cooling systems in ISA member countries.

Deliverables (D2.1):

- Submit a detailed report summarising the findings of the review of existing documentation, case studies, success and failure stories, lessons learned, and best practices, including recommendations for the most effective approaches to deploying solar heating and cooling systems in ISA member countries.
- Submit a compendium of solar thermal technologies being used around the globe and under development and provide the global trend analysis in terms of use, cost, business model, regulation, incentives, promotion etc.
- Submit a report on the supply chain of the solar thermal system including details of components of the supply chain and companies involved in it at the global, regional, and local level.
- Share all the raw data consulted while preparing the report with ISA in soft copies

4 Develop a comprehensive programme initiation framework for the Solarization of Heating and Cooling Systems

Based on the findings of the review of existing documents, information, and best practices in section 2.1, the consultant will develop a comprehensive programme initiation framework for ISA Programme 7: Solarization Heating and Cooling Systems. The programme will include a comprehensive programme initiation framework and road map for ISA and guidelines for an approach and methodology for country assessment in supporting solar thermal systems with a focus on heating and cooling applications.

Specific tasks include to:

- Develop the programme initiation framework and a roadmap of ISA's Programme 7: Solarisation of Heating and Cooling Systems
- Prepare a framework for country assessment and selection of technology and business model for deployment of solar thermal technology for heating and cooling applications in the ISA member countries.

- Provide policy recommendations, regulatory framework, and incentives for the adoption of solar heating and cooling systems
- Identify opportunities for collaboration and partnerships among stakeholders, including technology suppliers, financial investors, etc. in the solar heating and cooling sector to support the development and deployment of solar thermal systems.
- Identify how to strengthen the supply chain related to solar thermal technology in the country, including development at the domestic level to make it more resilient.

Deliverables (D2.2):

- Submit a comprehensive Programme Initiation Framework of ISA’s Programme 7: Solarisation of Heating and Cooling Systems
- Submit framework for country assessment methodology and selection of solar thermal technology and business model for adoption of solar thermal technologies in a country.
- Submit a report on research and development, donor mapping for collaboration and partnerships among stakeholders, including the ecosystem for private sector participation in the solar heating and cooling sector to make the supply chain resilient.

5 Recommendations for Activities and Interventions

The consultant will provide recommendations for specific activities and interventions that the ISA can undertake to implement the programme for the Solarization of Heating and Cooling Systems in member countries. These recommendations will be based on the findings of the review of existing documents, information and best practices and the comprehensive programme developed in sections 2.1 and 2.2. The consultant will provide a detailed plan of action, including timelines and budget estimates, for each recommended activity or intervention.

Specific tasks include to:

- Provide recommendations for activities and interventions that the ISA can undertake to implement the programme for the Solarization of Heating and Cooling Systems in member countries.
- Develop sample templates and questionnaires for project initiation, design, and implementation that meet international best practices
- Develop a plan of action, including contours of timelines and budget, for each recommended activity or intervention.
- Develop the action plan and interventions required at various levels, such as policy, regulation, incentives etc. to be taken by the country to facilitate the adoption of solar thermal technology.

Deliverables (D2.3):

- Submit a report containing recommendations for activities and interventions that the ISA can undertake to implement the programme for the Solarization of Heating and Cooling Systems in member countries. Include a plan of action, including timelines and budget estimates, for each recommended activity or intervention.

- Action plan recommendation for the government.

6 Capacity Building and Knowledge Sharing

The consultant will develop a capacity-building and knowledge-sharing plan to enhance the skills and knowledge of stakeholders involved in the solar heating and cooling sector based on section 2.3. This plan will include training workshops, knowledge-sharing events, and other capacity-building activities. The consultant will work closely with the ISA to ensure that the plan is aligned with the ISA's goals and objectives and that it meets the needs of stakeholders in ISA member countries.

Specific tasks:

- Develop a capacity-building and knowledge-sharing plan for stakeholders involved in the solar heating and cooling sector.
- Develop a suitable curriculum for the training of the policymakers, engineers and technicians in the field of solar thermal energy systems and technologies for both heating and cooling applications
- Design training workshops, knowledge-sharing events, and other capacity-building activities that will enhance the skills and knowledge of stakeholders.

Deliverables (D2.4):

- Submit a report on the capacity-building and knowledge-sharing plan that includes a list of training workshops, knowledge-sharing events, and other capacity-building activities. In addition, include a detailed implementation plan for each capacity-building activity, including training curriculum, timelines, budget estimates, and resources required.

7 Monitoring, Evaluation and Reporting Plan

The consultant will develop a monitoring and evaluation framework to assess the effectiveness of the programme for the Solarization of Heating and Cooling Systems. This framework will include indicators to measure the impact of the programme on the deployment of solar heating and cooling systems, as well as capacity-building and knowledge-sharing activities. The consultant will also develop a reporting mechanism, which the ISA can use to collect regular update on the progress of the programme from the member countries.

Specific tasks include to :

- Develop a monitoring and evaluation framework to assess the effectiveness of the programme for the Solarization of Heating and Cooling Systems.
- Develop indicators to assess the impact of the programme on the deployment of solar heating and cooling systems, as well as the capacity building and knowledge-sharing activities.
- Develop a reporting mechanism to provide regular updates on the progress of the programme by member countries to the ISA.

Deliverables (D2.5):

- Submit a sample monitoring and evaluation framework that includes indicators to measure the impact of the programme on the deployment of solar heating and cooling systems, as well as the capacity building and knowledge-sharing activities. The framework should include a reporting mechanism.

8 Qualifications and Experiences

The organisation should be experienced in the field of sustainable energy/renewable energy/engineering/climate change, including conducting research, analysis, deep dive into technology and policies, understanding of business models and financing of solar projects and programs and strategic planning. Additionally, they should have a solid understanding of the technical aspects of solar heating and cooling systems, as well as the economic, regulatory, and sustainability factors that come into play in designing a framework for programme initiation.

The general experiences desired are as follows:

- Experience in sustainable energy and climate change, with a strong focus on solar technology application
- Proven track record in developing solar energy programme implementation documents on time and within budget
- Should have conducted study and developed reports on policy and regulatory ecosystem of countries for solar technology
- The organisation should have worked for developing and least developed countries for promotion of solar technology
- In-depth knowledge of international renewable energy policies and regulations with a focus on solar heating and cooling systems
- Excellent communication and interpersonal skills, with the ability to work collaboratively with internal and external stakeholders
- Strong problem-solving skills and ability to think creatively to find innovative solutions

9 Organisational Qualification

The specific experiences desired are as follows:

- At least 12 years of experience in solar energy technology
- At least 10 projects completed in the solar sector, with a focus on policy and regulatory study of developing and least developed countries
- Experience in conducting country-level business planning and study for solar heating and cooling technology
- Experience of developing business models for solar energy projects, including financial modelling, risk analysis, and feasibility assessments
- Experience of working with Government entities/Multilateral/Bilateral organisations.

- Experience working with a range of solar heating and solar cooling technologies, including but not limited to solar thermal collectors, absorption chillers, and thermal energy storage systems

10 Team Composition

Team Leader:

- Minimum bachelor's degree in Engineering or master's degree in RE/Finance/Economics/Business.
- Minimum of 12 years' experience with a Master's Degree or 15 years' experience with a Bachelor's degree working for business planning, roadmap development etc in the energy sector
- Should have drafted/supported at least *three* country/regional/global level program/strategy/roadmap/assessment document covering solar energy
- Proven record in implementing and coordinating projects with multilateral/bilateral or central government agencies.

- **Financial expert:**
- Minimum Graduate in Engineering/Commerce/Economics/Finance/Business or Master's in Economics, Finance, or Development Studies.
- Minimum *seven* years of work experience in business development/marketing/product development on renewable energy.
- Working experience in investment advisory and Empowerment of youth SMEs.
- Experience in working with Government entities, CSOs and other development stakeholders,
- Computer literacy and experience with editing and presenting reports, especially for communicating development results.

- **RE Expert**
- Minimum a bachelor's in engineering or Masters in Environment/Energy/ Sustainable Development.
- Minimum *seven* years of work experience in the solar energy sector, including solar heating and cooling technology.
- Proven analytical and data skills, undertaking and analysing surveys
- Computer literacy and experience with editing and presenting reports, especially for communicating development results.

11 Bid Proposal inclusions

A detailed proposal is required for submission, which shall include a comprehensive approach and methodology on how it will be executed, but not limited to the scope and deliverables outlined in section 2. The evaluation of the successful consultant will be based on the quality and standard of the proposal submitted, along with meeting the qualifications and experiences for carrying out similar assignments. The proposal should include two sections as follows:

Section I: Compliance Statement Including a Detailed Methodology and Approach

It is required to submit a compliance statement, including a detailed methodology on how the task will be carried out. It should provide a brief introduction and a general understanding of the terms of reference. This can include a brief introduction of the assignment along with a brief history of similar assignments completed and how it can be aligned with the objective of the assignment.

The methodology requires elaboration detailing the approach that will be taken to complete the project. This could include the steps involved, tools and resources that will be required, and any unique aspects of the proposed approach. It's important to be clear and concise in this section to give the evaluators a thorough understanding of the proposed methodology and a consultant's approach in terms of bringing out a comprehensive programme initiation document on the solarisation of heating and cooling systems for ISA to be implemented in the member countries.

The detailed methodology and approach should consist of but not limited to the following:

- A brief introduction and compliance to the basic qualification requirements
- Must provide details of experience in conducting similar assessments and developing similar reports
- Bidder's understanding on the scope of work
- Detailed approach and methodology you propose to adopt
- Timeline and deliverables

Section II: Highlights of Experiences Carrying out Similar Assignments

The second section should focus on the qualifications and experiences of working on similar assignments. This includes their education, experience, and skills, as well as any relevant certifications or accomplishments. It's important to highlight how these qualifications specifically relate to the assignment's scope and the best fit for the job.

12 Schedule/ Timelines:

The work is to be completed in the timeframe of 18 weeks.

13 Payment Schedule and Deliverables

The payment schedule shall be as follows:

Deliverables		Timelines	Release of payment
D1	Advance		10%
D2	Kick-off meeting & Inception report	Week-0 – 1	10%
D3.1	Review report and summary of key findings and recommendations for the most effective approaches to deploying solar heating and cooling systems in ISA member countries.	Week 1-4	30%

D3.2	Initial draft Programme Initiation Framework of ISA Programme 7	Week 4 -8	
D3.3	Recommendations for activities and interventions, including a detailed plan of action and timeline	Week 8- 10	
D3.4	Capacity-building and knowledge-repository plan	Week 10 -12	
D3.5	Monitoring, Evaluation and Reporting Framework	Week 12 -14	
D4	Submission of Draft Final Programme Initiation Framework Document	Week 14 - 16	20%
	Presentation to ISA for feedback		
D5	Incorporation of comments and feedback	Week-16 -18	30%
	Submission & Acceptance of Final Programme Initiation Framework Document		

The timeframe may be modified on the basis of mutual consultation between the agency and ISA, however, all deliverables should be completed within the contract duration. All deliverables should be formatted and submitted in ready-to-use/print formats.

Section 6: Returnable Bidding Forms / Checklist

This form serves as a checklist for preparation of your Proposal. Please complete the Returnable Bidding Forms in accordance with the instructions in the forms and return them as part of your Proposal submission. No alteration to format of forms shall be permitted and no substitution shall be accepted. Before submitting your Proposal, please ensure compliance with the Proposal Submission instructions of the BDS 22.

Technical Proposal Envelope:

Have you duly completed all the Returnable Bidding Forms?	
▪ Form A: Technical Proposal Submission Form	<input type="checkbox"/>
▪ Form B: Bidder Information Form	<input type="checkbox"/>
▪ Form C: Joint Venture/Consortium/ Association Information Form	<input type="checkbox"/>
▪ Form D: Qualification Form	<input type="checkbox"/>
▪ Form E: Format of Technical Proposal	<input type="checkbox"/>
▪ Form H: Proposal Security Form	<input type="checkbox"/>
▪ [Add other forms as necessary]	<input type="checkbox"/>
Have you provided the required documents to establish compliance with the evaluation criteria in Section 4?	<input type="checkbox"/>

Financial Proposal Envelope

(Must be submitted in a separate sealed envelope/password protected email)

▪ Form F: Financial Proposal Submission Form	<input type="checkbox"/>
▪ Form G: Financial Proposal Form	<input type="checkbox"/>

FORM A: TECHNICAL PROPOSAL SUBMISSION FORM

Name of Bidder:	[Insert Name of Bidder]	Date:	Select date
RFP reference:	[Insert RFP Reference Number]		

We, the undersigned, offer to provide the services for [Insert Title of services] in accordance with your Request for Proposal No. [Insert RFP Reference Number] and our Proposal. We are hereby submitting our Proposal, which includes this Technical Proposal and our Financial Proposal sealed under a separate envelope.

We hereby declare that our firm, its affiliates or subsidiaries or employees, including any JV/Consortium /Association members or subcontractors or suppliers for any part of the contract:

- a) is not under procurement prohibition by the United Nations, including but not limited to prohibitions derived from the Compendium of United Nations Security Council Sanctions Lists;
- b) have not been suspended, debarred, sanctioned or otherwise identified as ineligible by any UN Organization or the World Bank Group or any other international Organization;
- c) have no conflict of interest in accordance with Instruction to Bidders Clause 4;
- d) do not employ, or anticipate employing, any person(s) who is, or has been an ISA staff member within the last year, if said ISA staff member has or had prior professional dealings with our firm in his/her capacity as ISA staff member within the last three years of service with the ISA;
- e) have not declared bankruptcy, are not involved in bankruptcy or receivership proceedings, and there is no judgment or pending legal action against them that could impair their operations in the foreseeable future;
- f) undertake not to engage in proscribed practices, including but not limited to corruption, fraud, coercion, collusion, obstruction, or any other unethical practice, with the ISA or any other party, and to conduct business in a manner that averts any financial, operational, reputational or other undue risk to the ISA and we *embrace the principles of the ISA Supplier Code of Conduct* https://isolaralliance.org/images/ISA%20Supplier%20Code%20of%20Conduct_14.4.2023.final%20version.pdf

We declare that all the information and statements made in this Proposal are true and we accept that any misinterpretation or misrepresentation contained in this Proposal may lead to our disqualification and/or sanctioning by the ISA.

We offer to provide services in conformity with the Bidding documents, including the ISA General Conditions of Contract and in accordance with the Terms of Reference https://www.isolaralliance.org/images/ISA_GTB.pdf

Our Proposal shall be valid and remain binding upon us for the period of time specified in the Bid Data Sheet.

We understand and recognize that you are not bound to accept any Proposal you receive.

I, the undersigned, certify that I am duly authorized by [Insert Name of Bidder] to sign this Proposal and bind it should ISA accept this Proposal.

Name: _____

Title: _____

Date: _____

Signature: _____

[Stamp with official stamp of the Bidder]

FORM B: BIDDER INFORMATION FORM

Legal name of Bidder	[Complete]
Legal address	[Complete]
Year of registration	[Complete]
Bidder's Authorized Representative Information	Name and Title: [Complete] Telephone numbers: [Complete] Email: [Complete]
Are you a UNGM registered vendor?	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, [insert UGNM vendor number]
Are you an ISA vendor?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Countries of operation	[Complete]
No. of full-time employees	[Complete]
Quality Assurance Certification (e.g. ISO 9000 or Equivalent) (If yes, provide a Copy of the valid Certificate):	[Complete]
Does your Company hold any accreditation such as ISO 14001 related to the environment? (If yes, provide a Copy of the valid Certificate):	[Complete]
Does your Company have a Written Statement of its Environmental Policy? (If yes, provide a Copy)	[Complete]
Contact person ISA may contact for requests for clarification during Proposal evaluation	Name and Title: [Complete] Telephone numbers: [Complete] Email: [Complete]
Please attach the following documents:	<ul style="list-style-type: none"> ▪ Company Profile, which should <u>not</u> exceed fifteen (15) pages, including printed brochures and product catalogues relevant to the goods/services being procured ▪ Certificate of Incorporation/ Business Registration ▪ Tax Registration/Payment Certificate issued by the Internal Revenue Authority evidencing that the Bidder is updated with its tax payment obligations, or Certificate of Tax exemption, if any such privilege is enjoyed by the Bidder ▪ Trade name registration papers, if applicable ▪ Local Government permit to locate and operate in assignment location, if applicable

- Official Letter of Appointment as local representative, if Bidder is submitting a Bid in behalf of an entity located outside the country
- Power of Attorney

FORM C: JOINT VENTURE/CONSORTIUM/ASSOCIATION INFORMATION FORM

Name of Bidder:	[Insert Name of Bidder]	Date:	Select date
RFP reference:	[Insert RFP Reference Number]		

To be completed and returned with your Proposal if the Proposal is submitted as a Joint Venture/Consortium/Association.

No	Name of Partner and contact information <i>(address, telephone numbers, fax numbers, e-mail address)</i>	Proposed proportion of responsibilities (in %) and type of services to be performed
1	[Complete]	[Complete]
2	[Complete]	[Complete]
3	[Complete]	[Complete]

Name of leading partner (with authority to bind the JV, Consortium, Association during the RFP process and, in the event a Contract is awarded, during contract execution)	[Complete]
--	------------

We have attached a copy of the below document signed by every partner, which details the likely legal structure of and the confirmation of joint and severable liability of the members of the said joint venture:

Letter of intent to form a joint venture **OR** JV/Consortium/Association agreement

We hereby confirm that if the contract is awarded, all parties of the Joint Venture/Consortium/Association shall be jointly and severally liable to ISA for the fulfillment of the provisions of the Contract.

Name of partner: _____	Name of partner: _____
Signature: _____	Signature: _____
Date: _____	Date: _____
Name of partner: _____	Name of partner: _____
Signature: _____	Signature: _____
Date: _____	Date: _____

FORM D: QUALIFICATION FORM

Name of Bidder:	[Insert Name of Bidder]	Date:	Select date
RFP reference:	[Insert RFP Reference Number]		

If JV/Consortium/Association, to be completed by each partner.

Historical Contract Non-Performance

<input type="checkbox"/> Contract non-performance did not occur for the last 3 years			
<input type="checkbox"/> Contract(s) not performed for the last 3 years			
Year	Non-performed portion of contract	Contract Identification	Total Contract Amount (current value in US\$)
		Name of Client: Address of Client: Reason(s) for non-performance:	

Litigation History (including pending litigation)

<input type="checkbox"/> No litigation history for the last 3 years			
<input type="checkbox"/> Litigation History as indicated below			
Year of dispute	Amount in dispute (in US\$)	Contract Identification	Total Contract Amount (current value in US\$)
		Name of Client: Address of Client: Matter in dispute: Party who initiated the dispute: Status of dispute: Party awarded if resolved:	

Previous Relevant Experience

Please list only previous similar assignments successfully completed in the last 3 years.

List only those assignments for which the Bidder was legally contracted or sub-contracted by the Client as a company or was one of the Consortium/JV partners. Assignments completed by the Bidder's individual experts working privately or through other firms cannot be claimed as the relevant experience of the Bidder, or that of the Bidder's partners or sub-consultants, but can be claimed by the Experts themselves in their CVs. The Bidder should be prepared to substantiate the claimed experience by presenting copies of relevant documents and references if so, requested by ISA.

Project name & Country of Assignment	Client & Reference Contact Details	Contract Value	Period of activity and status	Types of activities undertaken

Bidders may also attach their own Project Data Sheets with more details for assignments above.

Attached are the Statements of Satisfactory Performance from the Top 3 (three) Clients or more.

Financial Standing

Annual Turnover for the last 3 years	Year	USD
	Year	USD
	Year	USD
Latest Credit Rating (if any), indicate the source		

Financial information (in US\$ equivalent)	Historic information for the last 3 years		
	Year 1	Year 2	Year 3
	<i>Information from Balance Sheet</i>		
Total Assets (TA)			
Total Liabilities (TL)			
Current Assets (CA)			
Current Liabilities (CL)			
	<i>Information from Income Statement</i>		
Total / Gross Revenue (TR)			
Profits Before Taxes (PBT)			
Net Profit			
Current Ratio			

Attached are copies of the audited financial statements (balance sheets, including all related notes, and income statements) for the years required above complying with the following condition:

- a) Must reflect the financial situation of the Bidder or party to a JV, and not sister or parent companies;
- b) Historic financial statements must be audited by a certified public accountant;
- c) Historic financial statements must correspond to accounting periods already completed and audited. No statements for partial periods shall be accepted.

FORM E: FORMAT OF TECHNICAL PROPOSAL

Please ensure that the information below is adapted in accordance with the technical evaluation criteria included in Section 4. The below sections correspond to the sample criteria included in this template RFP in Section 4]

Name of Bidder:	[Insert Name of Bidder]	Date:	Select date
RFP reference:	[Insert RFP Reference Number]		

The Bidder's proposal should be organized to follow this format of Technical Proposal. Where the bidder is presented with a requirement or asked to use a specific approach, the bidder must not only state its acceptance, but also describe how it intends to comply with the requirements. Where a descriptive response is requested, failure to provide the same will be viewed as non-responsive.

SECTION 1: Bidder's qualification, capacity and expertise

- 1.1 Brief description of the organization, including the year and country of incorporation, and types of activities undertaken.
- 1.2 Specific organizational capability which is likely to affect implementation: management structure, financial stability and project financing capacity, project management controls.
- 1.3 Relevance of specialized knowledge and experience on similar engagements for fund-raising done in the region/country.
- 1.4 Quality assurance procedures and risk mitigation measures.
- 1.5 Organization's commitment to sustainability.

SECTION 2: Proposed Methodology, Approach and Implementation Plan

This section should demonstrate the bidder's responsiveness to the TOR by identifying the specific components proposed, addressing the requirements, providing a detailed description of the essential performance characteristics proposed and demonstrating how the proposed approach and methodology meets or exceeds the requirements. All important aspects should be addressed in sufficient detail and different components of the project should be adequately weighted relative to one another.

- 2.1 A detailed description of the approach and methodology for how the Bidder will achieve the Terms of Reference of the project, keeping in mind the appropriateness to local conditions and project environment. Details how the different service elements shall be organized, controlled and delivered.
- 2.2 The methodology shall also include details of the Bidder's internal technical and quality assurance review mechanisms.
- 2.3 Description of available performance monitoring and evaluation mechanisms and tools; how they shall be adopted and used for a specific requirement.
- 2.4 Implementation plan including a Gantt Chart or Project Schedule indicating the detailed sequence of activities that will be undertaken and their corresponding timing.
- 2.5 Demonstrate how you plan to integrate sustainability measures in the execution of the contract.

- 2.6 Any other comments or information regarding the project approach and methodology that will be adopted.

SECTION 2A: Bidder's Comments and Suggestions on the Terms of Reference

Provide comments and suggestions on the Terms of Reference, or additional services that will be rendered beyond the requirements of the TOR, if any.

SECTION 3: Management Structure and Key Personnel

- 3.1 Describe the overall management approach toward planning and implementing the project. Include an organization chart for the management of the project describing the relationship of key positions and designations. Provide a spreadsheet to show the activities of each personnel and the time allocated for his/her involvement.
- 3.2 Provide CVs for key personnel that will be provided to support the implementation of this project using the format below. CVs should demonstrate qualifications in areas relevant to the Scope of Services.

Format for CV of Proposed Key Personnel

NAME OF PERSONNEL	[INSERT]
POSITION FOR THIS ASSIGNMENT	[INSERT]
NATIONALITY	[INSERT]
LANGUAGE PROFICIENCY	[INSERT]

<p>EDUCATION/ QUALIFICATIONS</p> <hr/>	<p><i>[SUMMARIZE COLLEGE/UNIVERSITY AND OTHER SPECIALIZED EDUCATION OF PERSONNEL MEMBER, GIVING NAMES OF SCHOOLS, DATES ATTENDED, AND DEGREES/QUALIFICATIONS OBTAINED.]</i></p> <hr/> <p>[INSERT]</p>
<p>PROFESSIONAL CERTIFICATIONS</p> <hr/>	<p><i>[PROVIDE DETAILS OF PROFESSIONAL CERTIFICATIONS RELEVANT TO THE SCOPE OF SERVICES]</i></p> <hr/> <ul style="list-style-type: none">▪ NAME OF INSTITUTION: [INSERT]▪ DATE OF CERTIFICATION: [INSERT]

EMPLOYMENT
RECORD/
EXPERIENCE

[LIST ALL POSITIONS HELD BY PERSONNEL (STARTING WITH PRESENT POSITION, LIST IN REVERSE ORDER), GIVING DATES, NAMES OF EMPLOYING ORGANIZATION, TITLE OF POSITION HELD AND LOCATION OF EMPLOYMENT. FOR EXPERIENCE IN LAST FIVE YEARS, DETAIL THE TYPE OF ACTIVITIES PERFORMED, DEGREE OF RESPONSIBILITIES, LOCATION OF ASSIGNMENTS AND ANY OTHER INFORMATION OR PROFESSIONAL EXPERIENCE CONSIDERED PERTINENT FOR THIS ASSIGNMENT.]

[INSERT]

[PROVIDE NAMES, ADDRESSES, PHONE AND EMAIL CONTACT INFORMATION FOR TWO (2) REFERENCES]

REFERENCES

REFERENCE 1:

[INSERT]

REFERENCE 2:

[INSERT]

I, the undersigned, certify that to the best of my knowledge and belief, these data correctly describe my qualifications, my experiences, and other relevant information about myself.

Signature of Personnel

Date (Day/Month/Year)

FORM F: FINANCIAL PROPOSAL SUBMISSION FORM

Name of Bidder:	[Insert Name of Bidder]	Date:	Select date
RFP reference:	[Insert RFP Reference Number]		

We, the undersigned, offer to provide the services for [Insert Title of services] in accordance with your Request for Proposal No. [Insert RFP Reference Number] and our Proposal. We are hereby submitting our Proposal, which includes this Technical Proposal and our Financial Proposal sealed under a separate envelope.

Our attached Financial Proposal is for the sum of [Insert amount in words and figures].

Our Proposal shall be valid and remain binding upon us for the period of time specified in the Bid Data Sheet.

We understand you are not bound to accept any Proposal you receive.

Name: _____

Title: _____

Date: _____

Signature: _____

[Stamp with official stamp of the Bidder]

FORM G: FINANCIAL PROPOSAL FORM

Name of Bidder:	[Insert Name of Bidder]	Date:	Select date
RFP reference:	[Insert RFP Reference Number]		

The Bidder is required to prepare the Financial Proposal following the below format and submit it in an envelope separate from the Technical Proposal as indicated in the Instruction to Bidders. Any Financial information provided in the Technical Proposal shall lead to Bidder’s disqualification.

The Financial Proposal should align with the requirements in the Terms of Reference and the Bidder’s Technical Proposal.

Table 1: Summary of Overall Prices

	Amount(s)
Professional Fees	All Bidders shall quote only one price

Other Costs (If any)	
Total Amount of Financial Proposal (Monthly & Yearly separately)	

